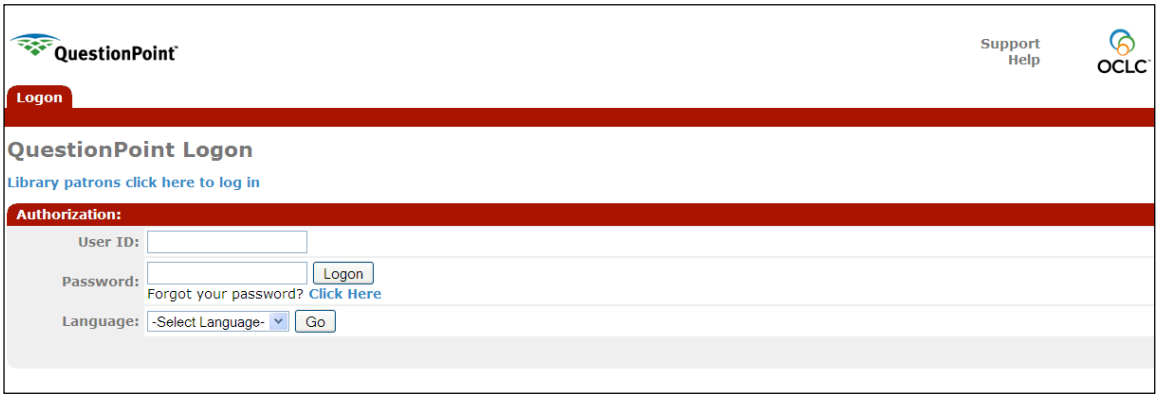
Logging In to QuestionPoint

1. Open Internet Explorer or another browser.
2. Clear the cache (Tools > Internet Options > Browsing History > Delete).

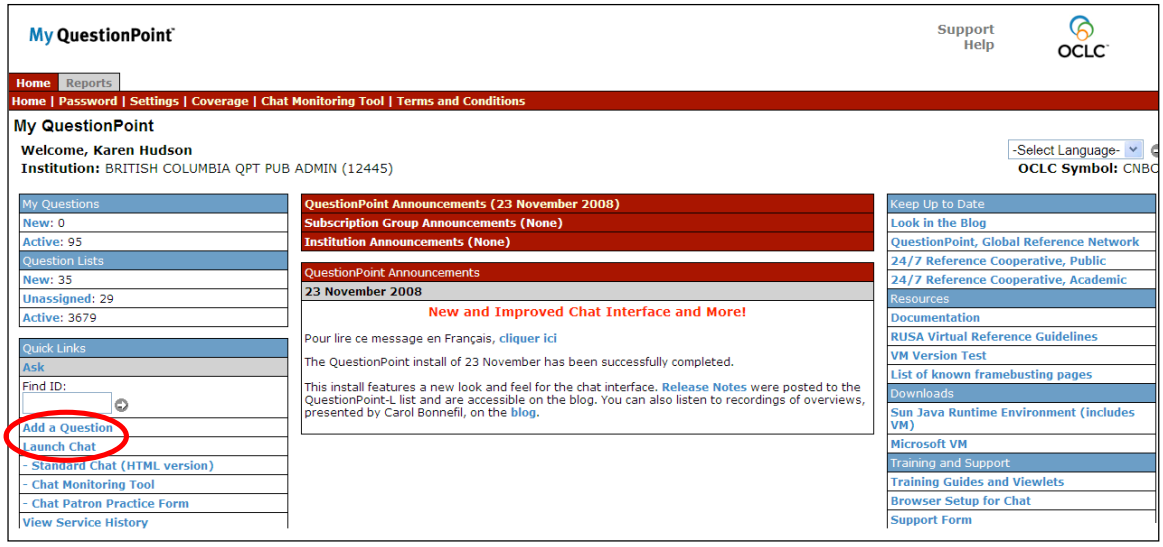
NOTE: A complete list of browser settings can be found on the AskAway Staff Portal: http://www.askaway.org/staff

3. Point your browser to http://www.questionpoint.org and click on "Librarian Login".
4. Enter your login number and password. (If you aren't sure what your login is, contact your local AskAway administrator.)



Opening Chat

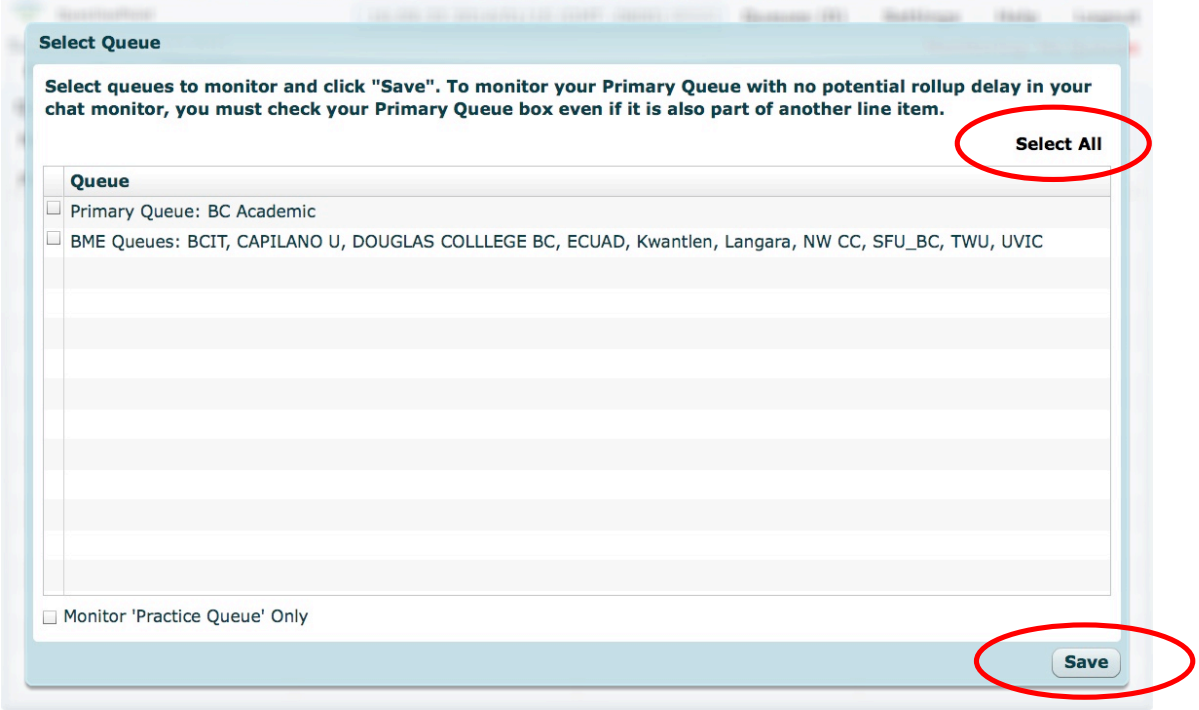
1. Click **Launch Chat** under Quick Links..


My QuestionPoint
Support
Help
OCLC
Home
Reports
Home | Password | Settings | Coverage | Chat Monitoring Tool | Terms and Conditions
My QuestionPoint
Welcome, Karen Hudson
Institution: BRITISH COLUMBIA QPT PUB ADMIN (12445)
-Select Language-
OCLC Symbol: CNBC
My Questions
New: 0
Active: 95
Question Lists
New: 35
Unassigned: 29
Active: 3679
Quick Links
Ask
Find ID:
Add a Question
Launch Chat
- Standard Chat (HTML version)
- Chat Monitoring Tool
- Chat Patron Practice Form
View Service History
QuestionPoint Announcements (23 November 2008)
Subscription Group Announcements (None)
Institution Announcements (None)
QuestionPoint Announcements
23 November 2008
New and Improved Chat Interface and More!
Pour lire ce message en Français, cliquer ici
The QuestionPoint install of 23 November has been successfully completed.
This install features a new look and feel for the chat interface. Release Notes were posted to the QuestionPoint-L list and are accessible on the blog. You can also listen to recordings of overviews, presented by Carol Bonnefil, on the blog.
Keep Up to Date
Look in the Blog
QuestionPoint, Global Reference Network
24/7 Reference Cooperative, Public
24/7 Reference Cooperative, Academic
Resources
Documentation
RUSA Virtual Reference Guidelines
VM Version Test
List of known framebusting pages
Downloads
Sun Java Runtime Environment (includes VM)
Microsoft VM
Training and Support
Training Guides and Viewlets
Browser Setup for Chat
Support Form

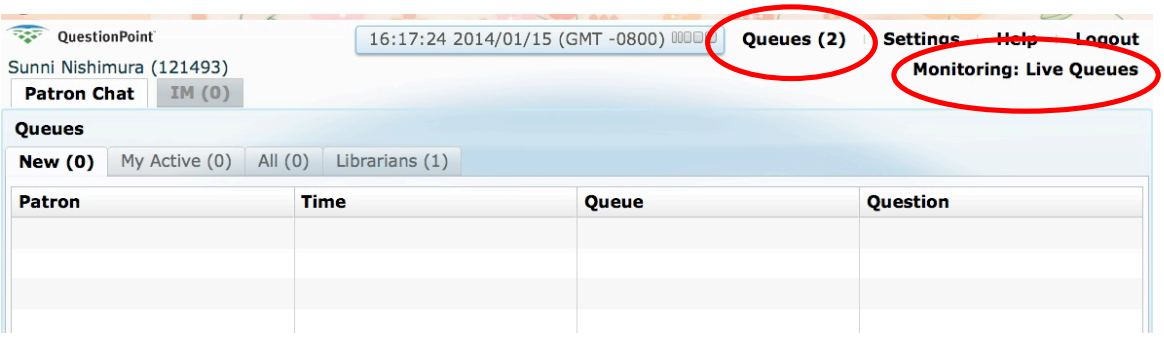
The chat monitor will open in a new window. Maximise this window when it opens.

Selecting your Queues

1. When you login, you will see this page asking you to select Queue. Click on Select All, or check the boxes for the **Primary Queue** AND the **BME Queues**, and click on "Save." NOTE: If you are only staffing your own institution's queue, then you'll only click on Primary Queue. If you are not sure which queues to select, select all.


Select Queue
Select queues to monitor and click "Save". To monitor your Primary Queue with no potential rollup delay in your chat monitor, you must check your Primary Queue box even if it is also part of another line item.
Select All
Queue
Primary Queue: BC Academic
BME Queues: BCIT, CAPILANO U, DOUGLAS COLLLEGE BC, ECUAD, Kwantlen, Langara, NW CC, SFU_BC, TWU, UVIC
Monitor 'Practice Queue' Only
Save

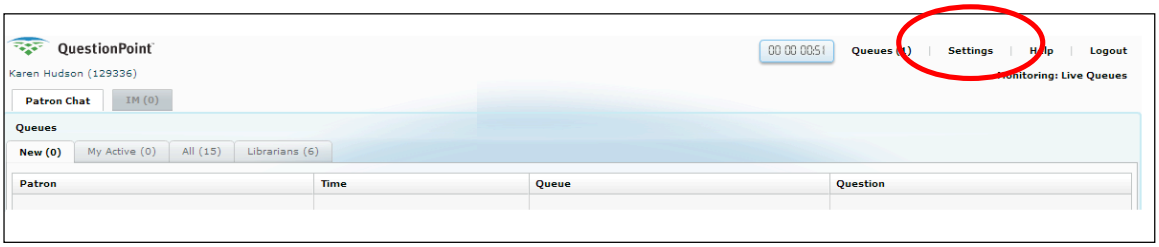
2. The queue number will change to reflect the queues you are monitoring, and you will see a notification in the top right hand corner of the screen advising you that you are monitoring the live queues. If this notification disappears during your chat session, you may need to reselect your queues.



3. To resubmit (or change) your queues at any time, click on "Queues" and repeat the steps above.

Settings

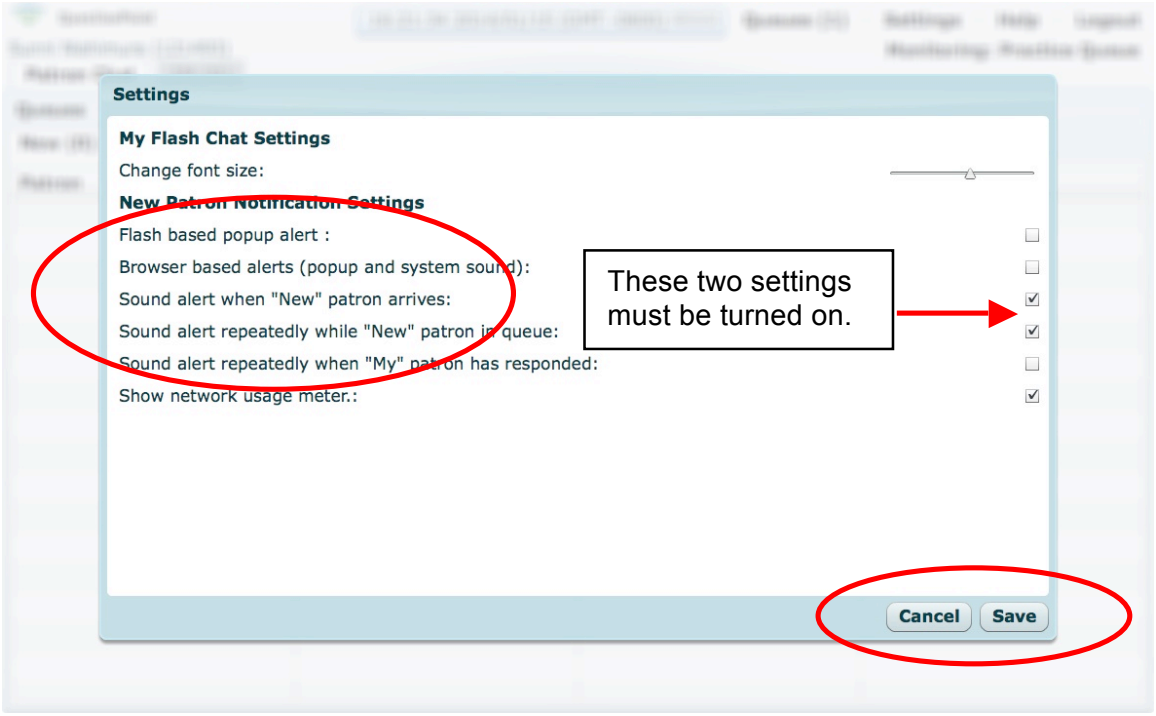
1. Click on “Settings” to check or alter your settings.



2. The two sound alert settings MUST be turned to on. You can choose your own preferences for visual alerts, and the font size.

   NOTE: Can’t hear the sound alert? Check the volume settings on your computer. Are your speakers plugged in?

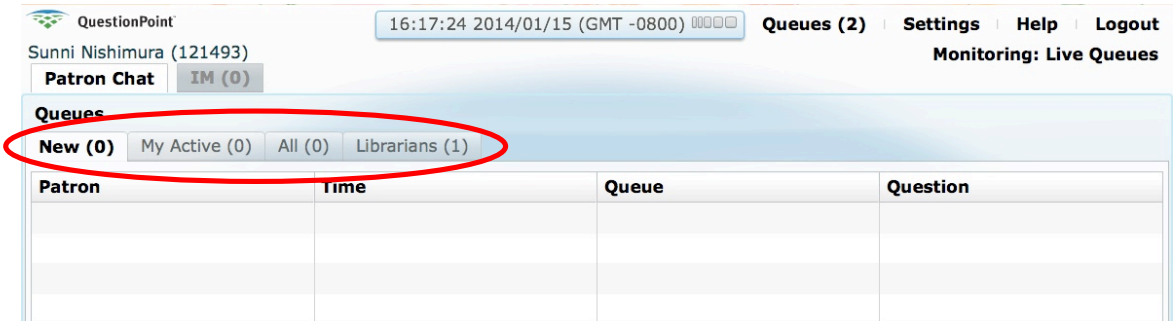
   Don’t have speakers? Make sure you choose EITHER Flash based pop-up alert or Browser based pop-up alert instead.


Settings
My Flash Chat Settings
Change font size:
New Patron Notification Settings
Flash based popup alert :
Browser based alerts (popup and system sound):
Sound alert when "New" patron arrives:
Sound alert repeatedly while "New" patron in queue:
Sound alert repeatedly when "My" patron has responded:
Show network usage meter.:
These two settings must be turned on.
Cancel
Save

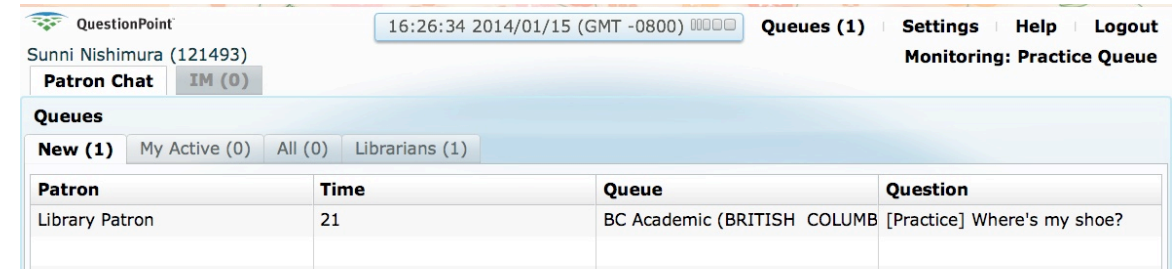
3. Make sure you click on “Save” when you have selected your preferences. The software will remember your settings in the future.

Chat Monitor

1. While you are waiting for a new patron to arrive, your screen will show **New (0)** as below. You can also see how many staff are working **Librarians (#)**, and how many calls *other* librarians are handling **All (#).**



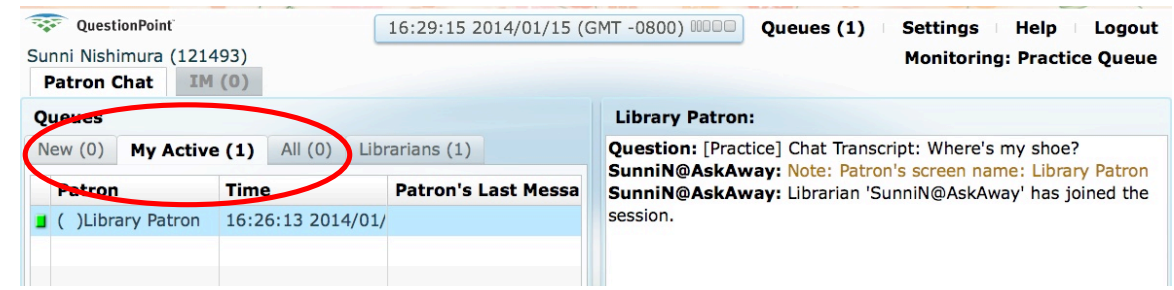
Incoming Patron



1. When a new patron arrives, an alert will sound or a pop-up box will appear on your screen (this depends on your settings). The patron's information appears in the **New** tab. If you hover the mouse over this information, you will see a preview of the patron's question. [Qwidget] will appear in the question if the patron is chatting via a Qwidget.

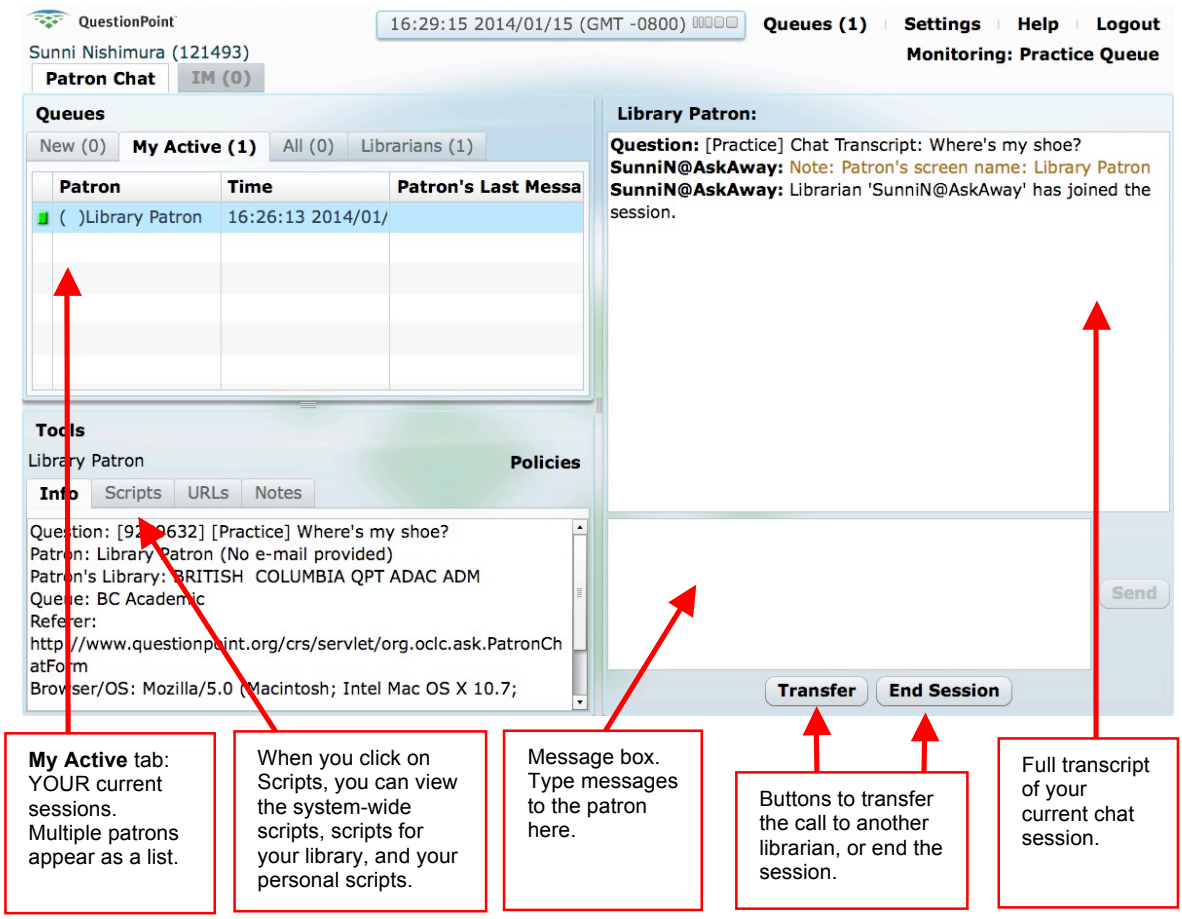
2. To retrieve the patron, click anywhere on their information in the **New** tab. The patron will move into **My Active** tab and you will be able to see their information, including their home library, in the Info box at the bottom.

*NOTE: All of the calls YOU are handling will appear in the **My Active** tab; the calls **other** librarians are handling will appear in the **All** tab.*



Chatting

These are the main features you will need to use when chatting:

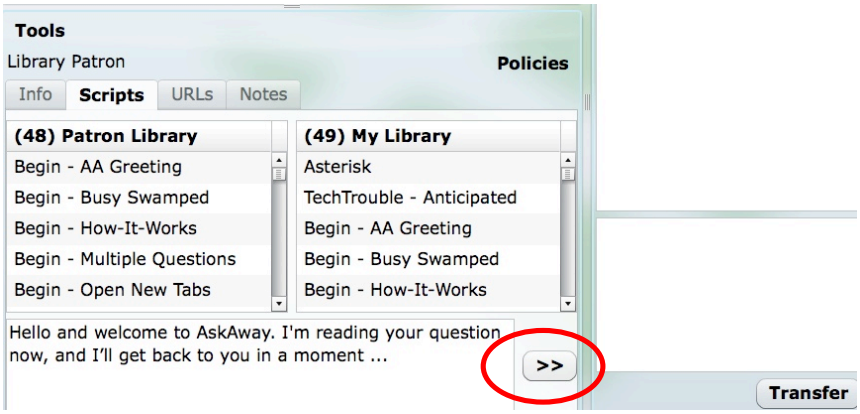


Sending Chat Messages

1. Move the curser into the Message Box.
2. Type the message you want to send into the Message Box.
3. Press Enter or click **Send**.
4. If chatting with a Qwidget patron, remember to keep your messages short or broken up into smaller pieces. Use scripts labelled Qwidget for shorter options.

Using Prescripted Messages

1. Click on the Scripts tab to view the script options.



2. Click on your selected script to view the full text in the lower box.

3. There are 3 types of scripts:
   Service-wide scripts will appear in both Patron Library and My Library lists.
   Institution Scripts specific to the Patron's Library will appear in the Patron Library list.
   Scripts specific to your library, and any **personal scripts** that you have created, will appear in the My Library list.

NOTE: See the AskAway Staff Portal for instructions on creating institutional or personal scripts.

4. Modify the text as needed, then click >> to transfer to the Message Box. Press Enter or click **Send**.

NOTE: You can also view the full list of service-wide scripts on the AskAway Staff Portal.

Pushing Web Pages

1. Enter the URL you want to push to the patron in the Message Box.

   NOTE: Always include the http:// to ensure that the page you send will show up on the patron's screen.

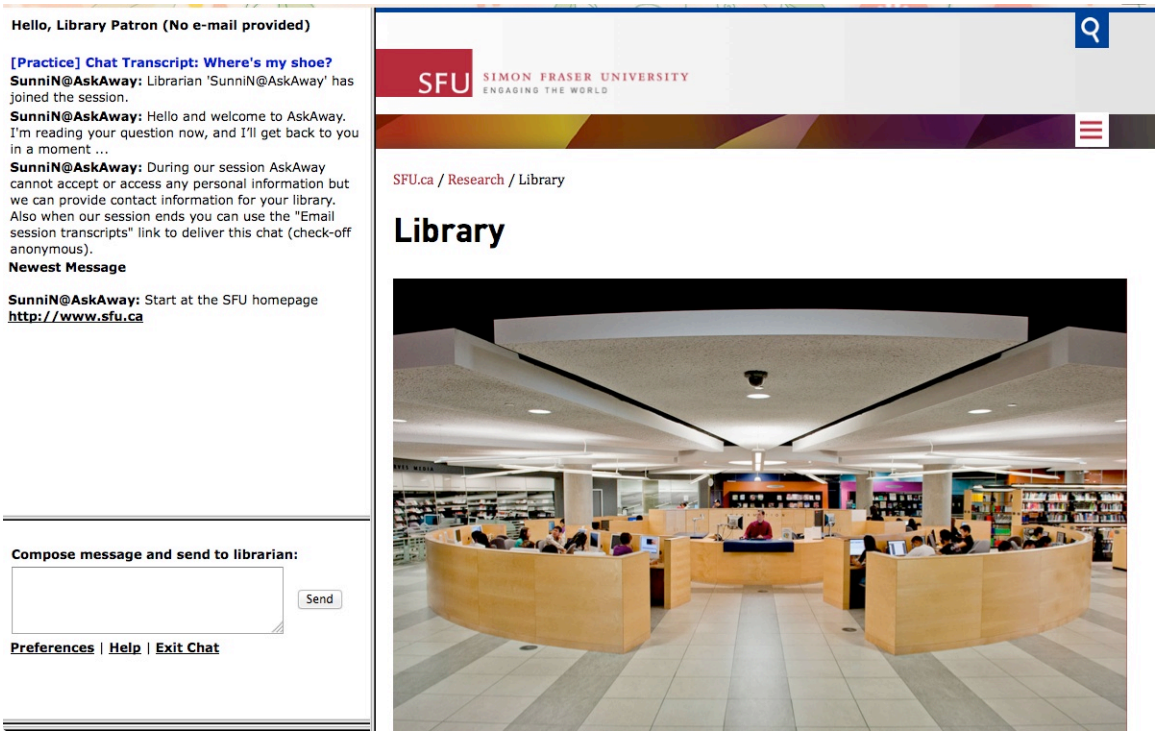
2. Press Enter or click **Send**.

   NOTE: Always check that the patron can see the page the first time you push one to them during the session.

Staff view of a pushed page:

QuestionPoint
Karen Hudson (129336)
00 00 38:04
Queues (1)
Settings
Help
Monitoring: Live
Patron Chat
IM (0)
Queues
New (0)
My Active (1)
All (1)
Librarians (5)
Patron
Time
Patron's Last Message
(+) Library Patron
14:34:18 2008/11/25
14:39 Yes I can
Library Patron
Question: Chat Transcript: I need information on the environment
Karen @ AskAway: Note: Patron's screen name: Library Patron
Karen @ AskAway: Librarian 'Karen @ AskAway' has joined the session.
Karen @ AskAway: Hello and welcome to askaway. I'm just reading your question...
Library Patron: I need some information for a school project.
Karen @ AskAway: I'm going to send you a link to the Atlas of Canada...can you tell me if there is s
specific about the environment that you need to know?
Library Patron: Thanks you
Karen @ AskAway: http://atlas.nrcan.gc.ca/site/english/index.html
Karen @ AskAway: Can you see the page on the left of your screen?
Library Patron: Yes I can

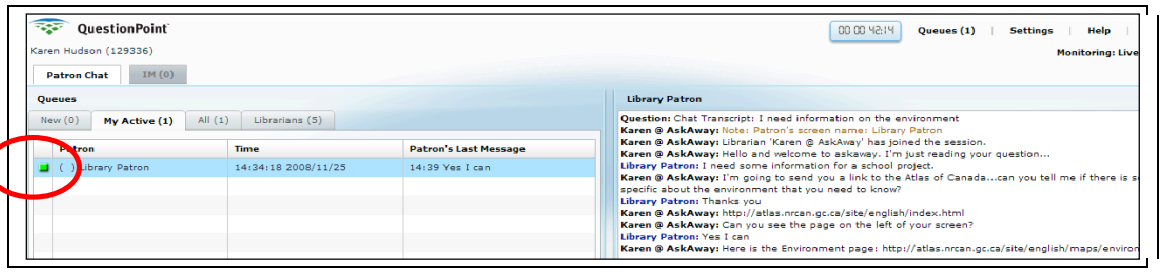
Patron view of a pushed page:


Hello, Library Patron (No e-mail provided)
[Practice] Chat Transcript: Where's my shoe?
SunniN@AskAway: Librarian 'SunniN@AskAway' has joined the session.
SunniN@AskAway: Hello and welcome to AskAway. I'm reading your question now, and I'll get back to you in a moment ...
SunniN@AskAway: During our session AskAway cannot accept or access any personal information but we can provide contact information for your library. Also when our session ends you can use the "Email session transcripts" link to deliver this chat (check-off anonymous).
Newest Message
SunniN@AskAway: Start at the SFU homepage http://www.sfu.ca
Compose message and send to librarian:
Send
Preferences | Help | Exit Chat
SFU
SIMON FRASER UNIVERSITY
ENGAGING THE WORLD
SFU.ca / Research / Library
Library

Patron Connectivity and Status Indicators

The patron connectivity indicator shows you whether your patron is still connected to the session.

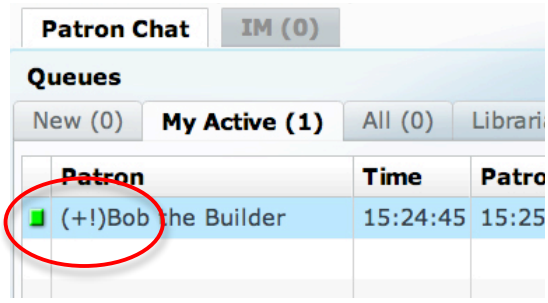
1. A live connection shows as a green square. The QuestionPoint server has been able to connect to the patron's browser window every 5 seconds.


QuestionPoint
Karen Hudson (129336)
Queues (1)
Settings
Help
Patron Chat
IM (0)
Queues
New (0)
My Active (1)
All (1)
Librarians (5)
Patron
Time
Patron's Last Message
Library Patron
14:34:18 2008/11/25
14:39 Yes I can
Library Patron
Question: Chat Transcript: I need information on the environment
Karen @ AskAway: Librarian 'Karen @ AskAway' has joined the session.
Karen @ AskAway: Hello and welcome to askaway. I'm just reading your question...
Library Patron: I need some information for a school project.
Library Patron: Thanks you
Karen @ AskAway: http://atlas.nrcan.gc.ca/site/english/index.html
Karen @ AskAway: Can you see the page on the left of your screen?
Library Patron: Yes I can

2. A yellow diamond indicates that the patron is still connected, but the QuestionPoint server has not been able to connect to the patron's browser window for more than 15 seconds.

3. A red circle indicates that the QuestionPoint server has not been able to connect to the patron's browser window for more than 30 seconds. The patron may have disconnected or navigated away from the page. There is still a chance that they will return to the page.

The patron status indicator is in brackets beside the patron's screen name.

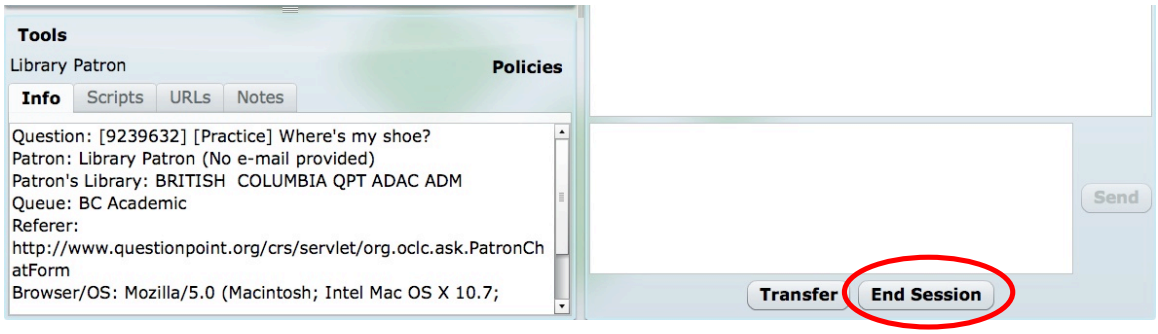


What the symbols mean:

( ) Librarian sent the last msg
(+) Patron sent the last msg
(!) Patron is typing
> Patron was transferred to you

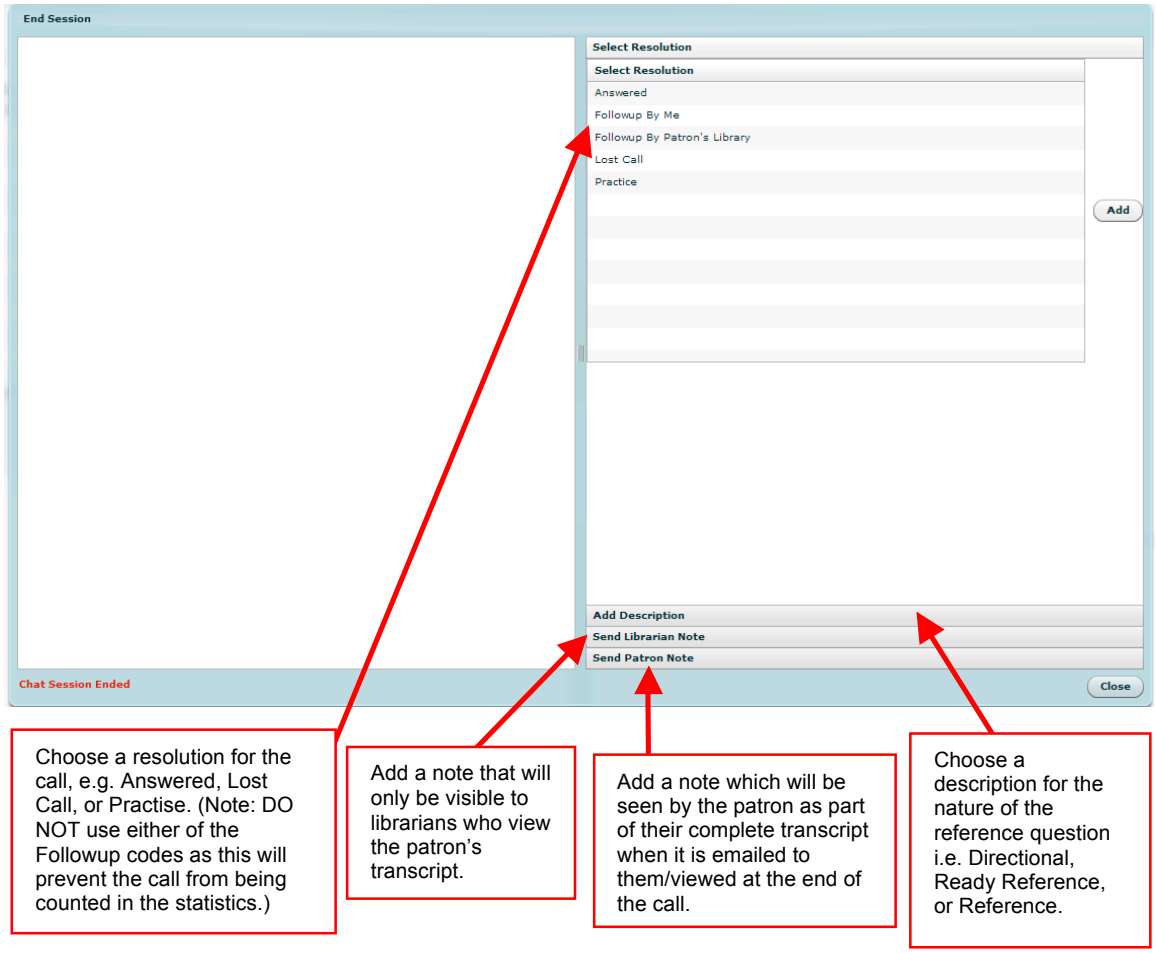
Ending a call

1. Confirm that the patron has all the information they need, and that they have no further questions.
2. Click End Session.
3. At the patron's end, they will be prompted to enter their email address for a copy of the transcript.



4. Add a resolution code: only use Answered, Lost Call or Practise. Using either of the Follow Up codes will prevent the call from being counted in the statistics.

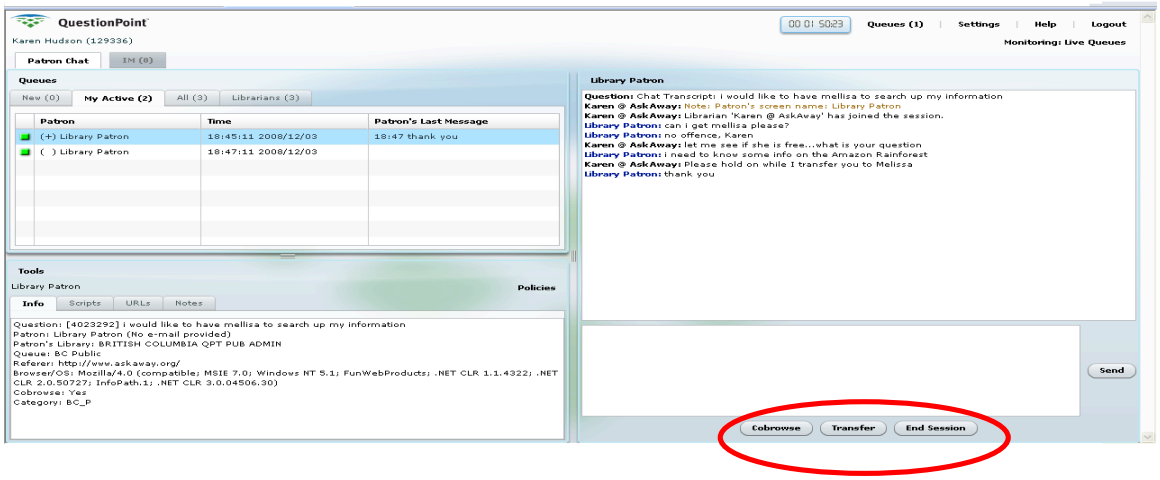
   To add the codes, click to select the code and then click **Add**.


End Session
Select Resolution
Select Resolution
Answered
Followup By Me
Followup By Patron's Library
Lost Call
Practice
Add
Add Description
Send Librarian Note
Send Patron Note
Chat Session Ended
Close
Choose a resolution for the call, e.g. Answered, Lost Call, or Practise. (Note: DO NOT use either of the Followup codes as this will prevent the call from being counted in the statistics.)
Add a note that will only be visible to librarians who view the patron's transcript.
Add a note which will be seen by the patron as part of their complete transcript when it is emailed to them/viewed at the end of the call.
Choose a description for the nature of the reference question i.e. Directional, Ready Reference, or Reference.

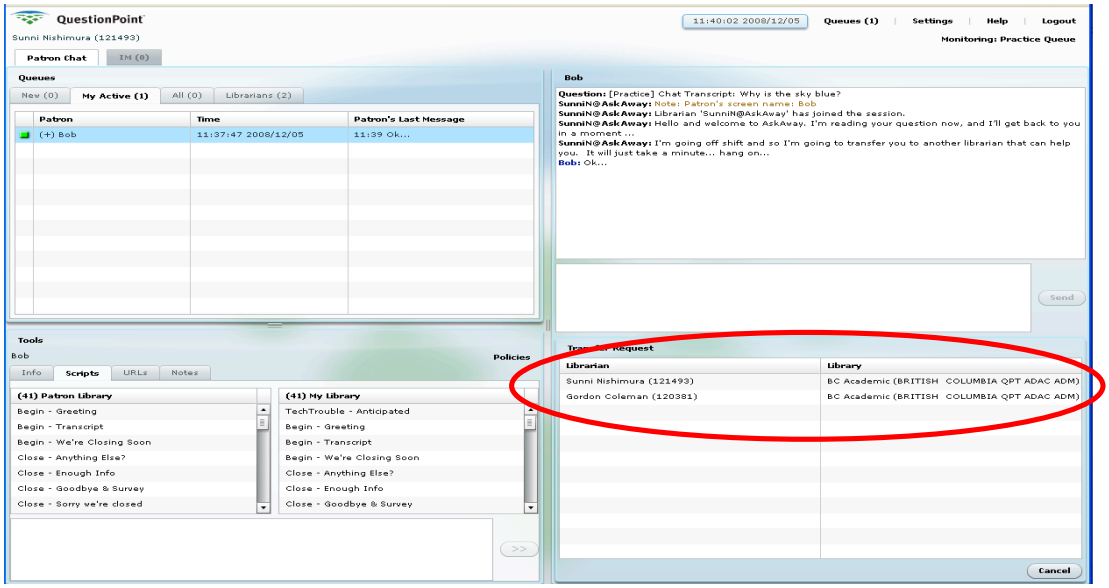
Transferring a call to another librarian

NOTE: Before transferring a call, always confirm with the librarian you are transferring to via Campfire or IM. NEVER transfer a call to a librarian that is only staffing 1 queue, unless they specifically ask for it.

1. Click the **Transfer** button.



2. A list of librarians currently online will appear. Click on the name of the librarian you want to take the call.



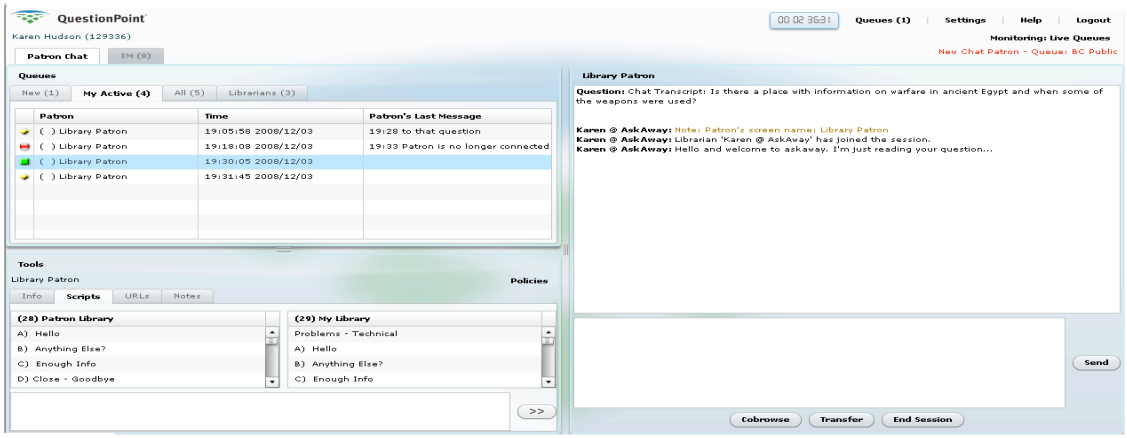
3. Click on **Transfer** again, and the call will be transferred to that librarian. They will see a message telling them the call has transferred successfully to their My Active tab.

Multiple Patrons

If you have more than one chat session ongoing, the patrons will appear as a list in the **My Active** tab (the **All** tab lists calls *other* librarians are working on). The patron you are currently working on will be highlighted in blue.

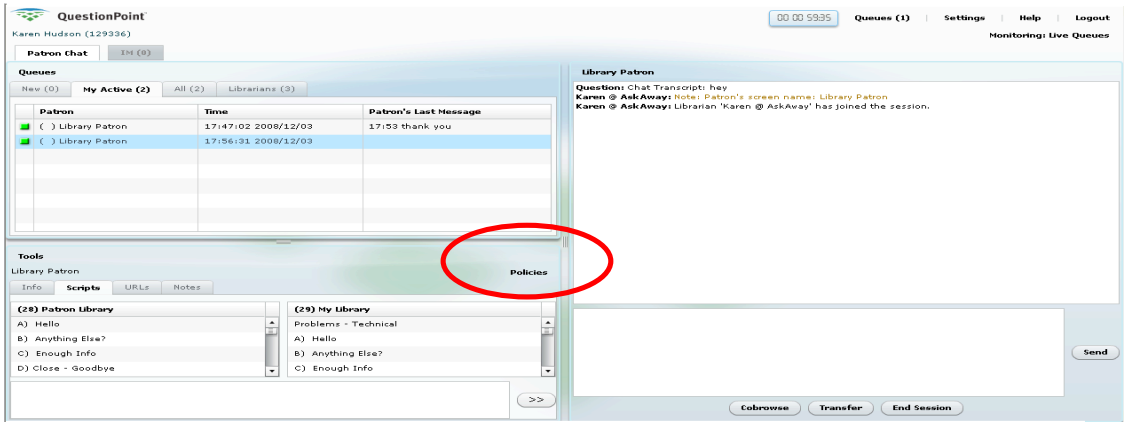
1. Hover the mouse over “Library Patron” to see a preview of the patron’s last message.

2. Click on the patron’s name (“Library Patron”) to move between patrons. The blue highlight will move and the transcript will appear on the right of the screen.



Policy Pages

1. To see ready reference information about a patron’s home library, click on the Policies link.



2. The policy page (which may take the form of a link) will open in a new window.